CLASS TITLE: TAX RETURN PROCESSING OPERATOR II (TAXATION)

Class Code: 02687503
Pay Grade: 18
EO Code: F

CLASS DEFINITION:

GENERAL STATEMENT OF DUTIES: Within the Department of Revenue (DOR) Division of Taxation, to perform a variety of mail processing, data entry functions, worklist reviews, and scanning functions; to receive, sort, open, and appropriately distribute the incoming mail; to scan, prepare, data enter and batch a variety of tax documents and payments; to unsuspend returns and payments and work with suspended document worklists; to scan, upload and maintain documents in accordance with standard procedures; and to do related work as required.
SUPERVISION RECEIVED: Works under the supervision and/or professional guidance of Tax Return Processing Supervisor from whom general work assignments are received; work is reviewed upon completion for accuracy and conformance to accepted principles, instructions, laws, rules, and regulations.
SUPERVISION EXERCISED: May guide and coach other Tax Return Processing Operators as requested.

ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:

Within the Department of Revenue (DOR) Division of Taxation, to perform a variety of mail processing, data entry functions, worklist reviews and scanning functions.

To receive, sort, open and appropriately distribute the incoming mail.

To scan, prepare, data enter and batch a variety of tax documents and payments.

To unsuspend returns and payments and work with suspended document worklists.

To scan, upload and maintain documents in accordance with standard procedures.

To prepare source data for computer-based data entry by compiling information, sorting information and establishing data entry priorities.

To process customer and account source documents by reviewing data for completeness and accuracy of preparation and reconciliation of processing data to existing taxpayer demographic records.

To resolve deficiencies by using standard procedures or returning incomplete documents to the team leader for resolution.

To enter, update, correct and retrieve customer and account data with speed and accuracy by inputting alphabetic and numeric information according to screen format.

To maintain data entry requirements by following data program techniques and procedures.

To verify entered customer and account data by reviewing, correcting, or reentering data with speed and accuracy.

To maintain operations by following policies and procedures and reporting needed changes.

To maintain customer confidence and protect operations by keeping information confidential.

To interact with taxpayers and members of the public professionally and courteously and to assist in resolving taxpayer problems and inquiries.

To contribute to team effort by assisting with and accomplishing related results as needed.

To perform various tax functions using databases, spreadsheets and other related digital means.

To provide technical assistance to taxpayers in the areas of Rhode Island personal income tax and Rhode Island business corporation tax.

To do related work as required.

REQUIRED QUALIFICATIONS FOR APPOINTMENT:

KNOWLEDGE, SKILLS AND CAPACITIES: Knowledge of the forms, processes and transactions of an

assigned tax section; knowledge of collection processes and payment methods; the ability to data enter tax forms with speed and accuracy; the ability to resolve routine taxpayer problems and inquiries; the ability to utilize computer software and databases in completing tax transactions; knowledge of Windows Operating Systems, usage of a personal computer (PC) and standard desktop office tools; the ability to interact with taxpayers, the public and co-workers in a professional, tactful and courteous manner; the ability to follow verbal and written instructions and to review and enter tax-related forms and documents; and related capacities and abilities.

EDUCATION AND EXPERIENCE:

Education: Possession of an Associate's degree from a college of recognized standing; and
Experience: At least two (2) years of employment involving processing tax documentation and the operation of computer-based data entry equipment.
Or, Possession of an Associate's degree from a college of recognized standing and at least three (3) years of experience performing a variety of moderate to complex office support involving customer-facing service and computer-based tasks involving the Microsoft Windows suite of software programs.

Class Created: November 21, 2021